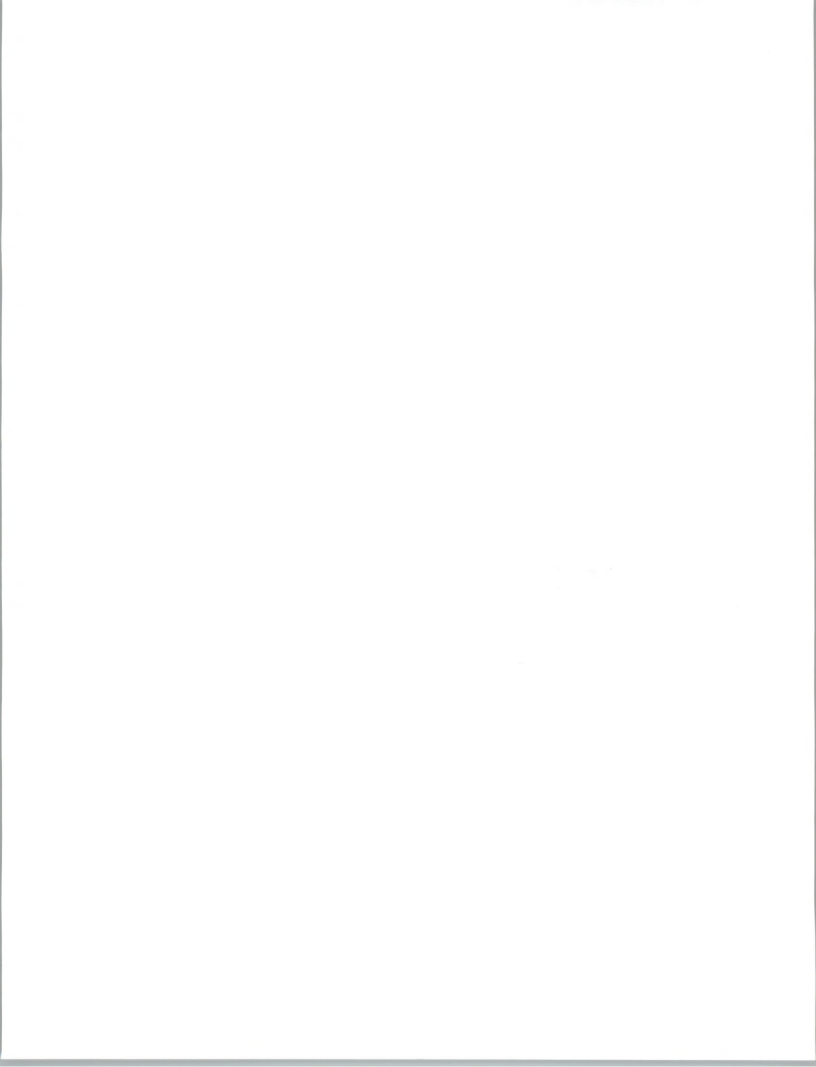


The Impact of Multimedia on Client/Server Computing

Laura Haggerty
Manager
Vendor Analysis Program



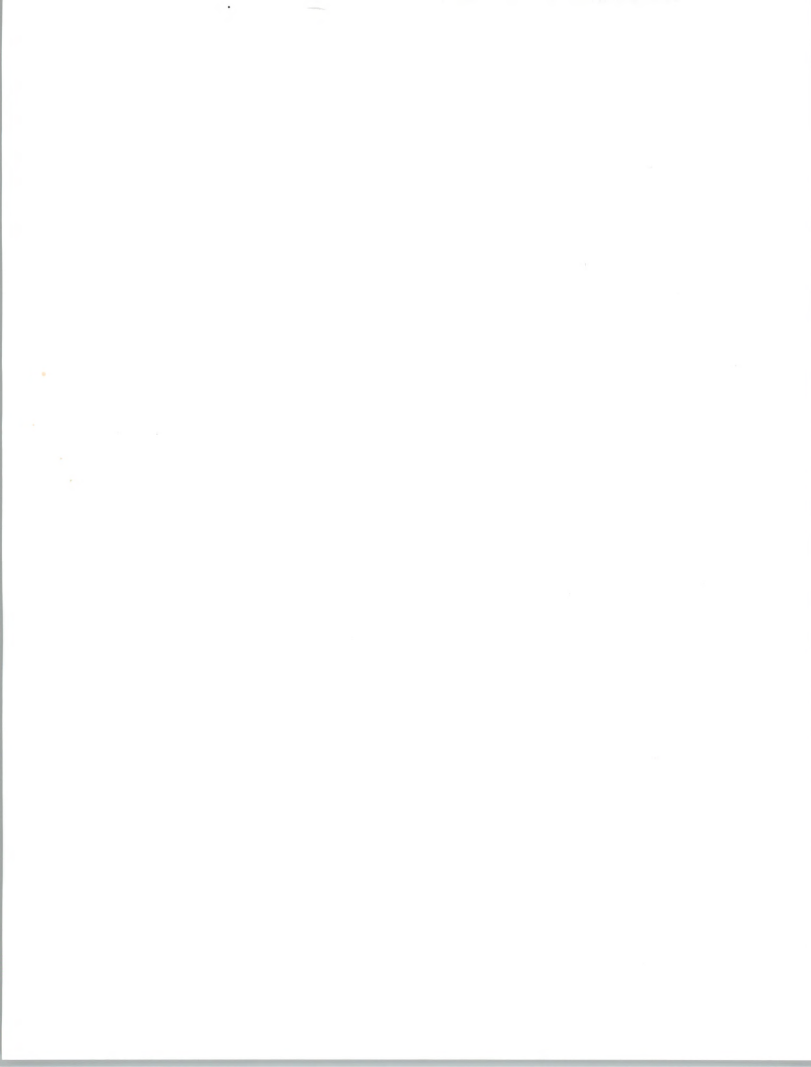
The Impact of Multimedia on Client/Server Computing

- Market Definition
- Market Segmentation
- Market Size Estimates
- Multimedia Impact on Network Delivery
- Market Players
- Conclusions

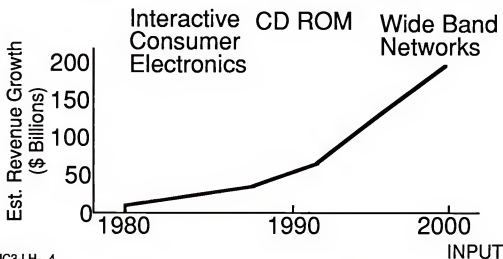
MC3-LH- 3

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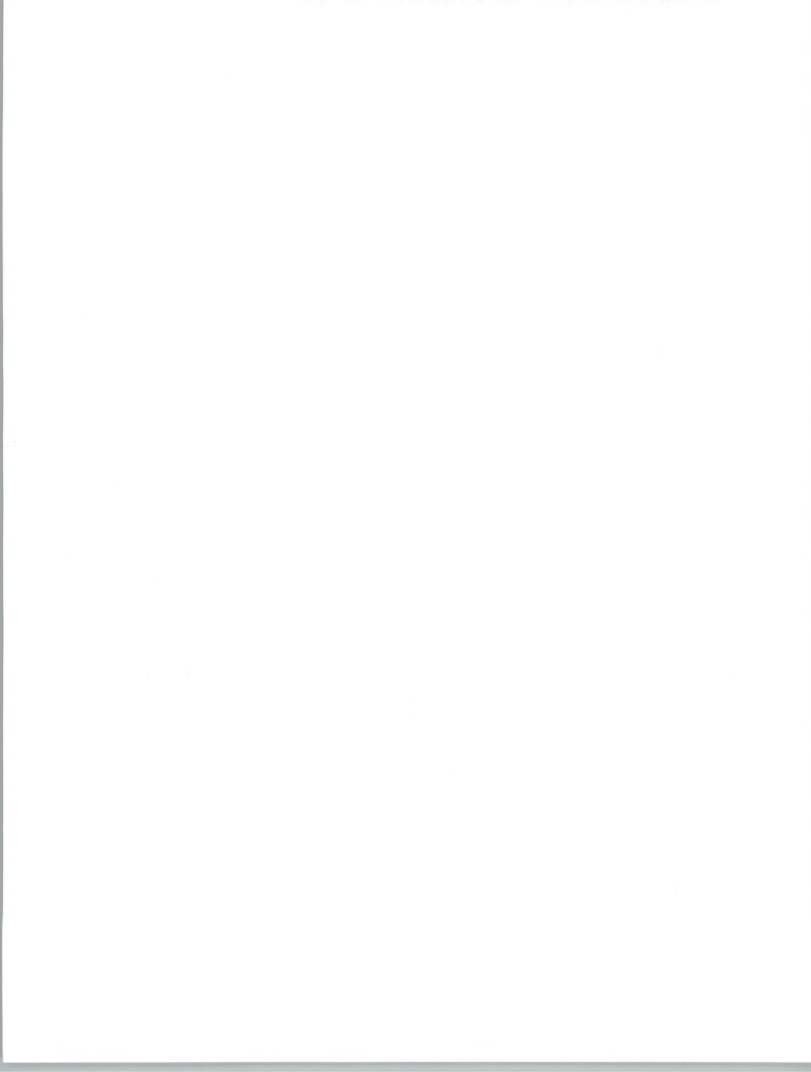
Notes



The Emerging Multimedia Industry



Notes



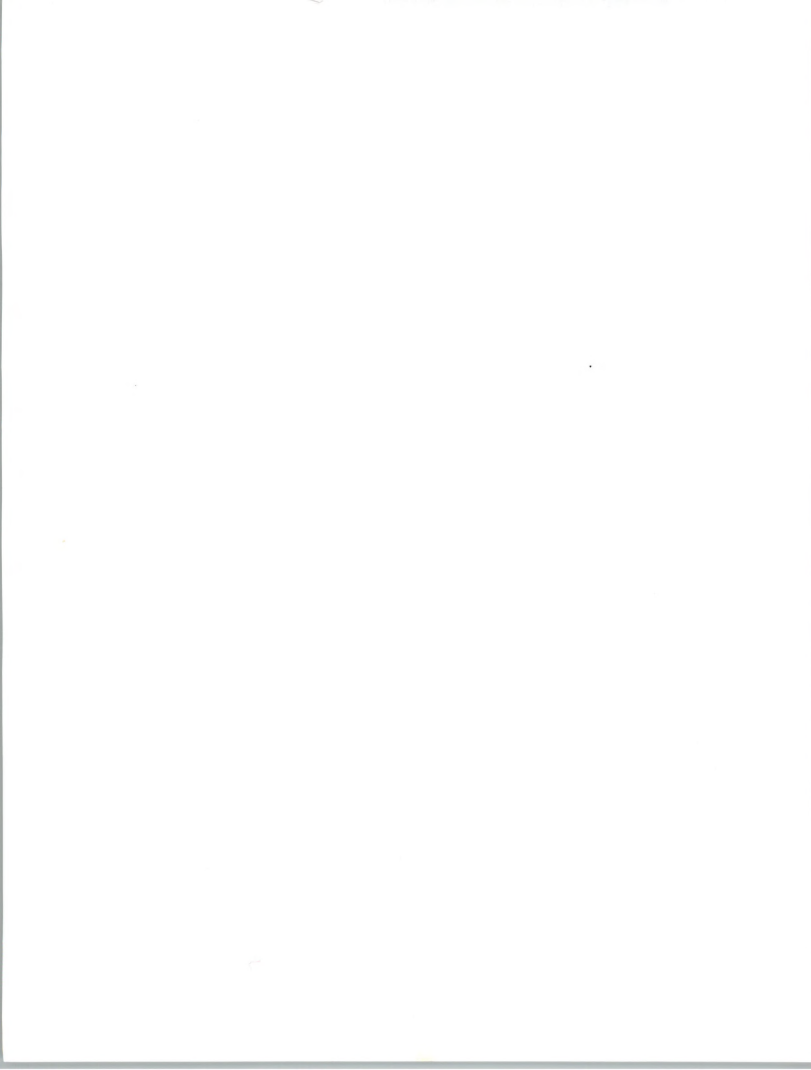
1993 U.S. Multimedia Market Estimates

Market	Market Size (\$ Billions)
Corporate applications	1
Games/consumer applications	6

MC3-LH- 5

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Notes



Participating Companies

- Delivery channels
- Enabling technologies
- Content providers
- Applications providers

MC3-LH- 6

INPUT

Notes

Market Collisions

- Computer and games
- Network services and cable companies
- Content providers and technology channel deliverers

MC3-LH- 7

INPUT

Notes

Market Segment: "Info-tainment"

- Market size
- Market transitions
- Alliances

MC3-LH- 8

INPUT

Notes

The Potential \$200B "Info-tainment" Market

Market	Size (\$ B)
Catalog shopping	51
Outbound telemarketing	32
Newspapers	31
Television advertising	28
Direct mail	25

MC3-LH- 9a

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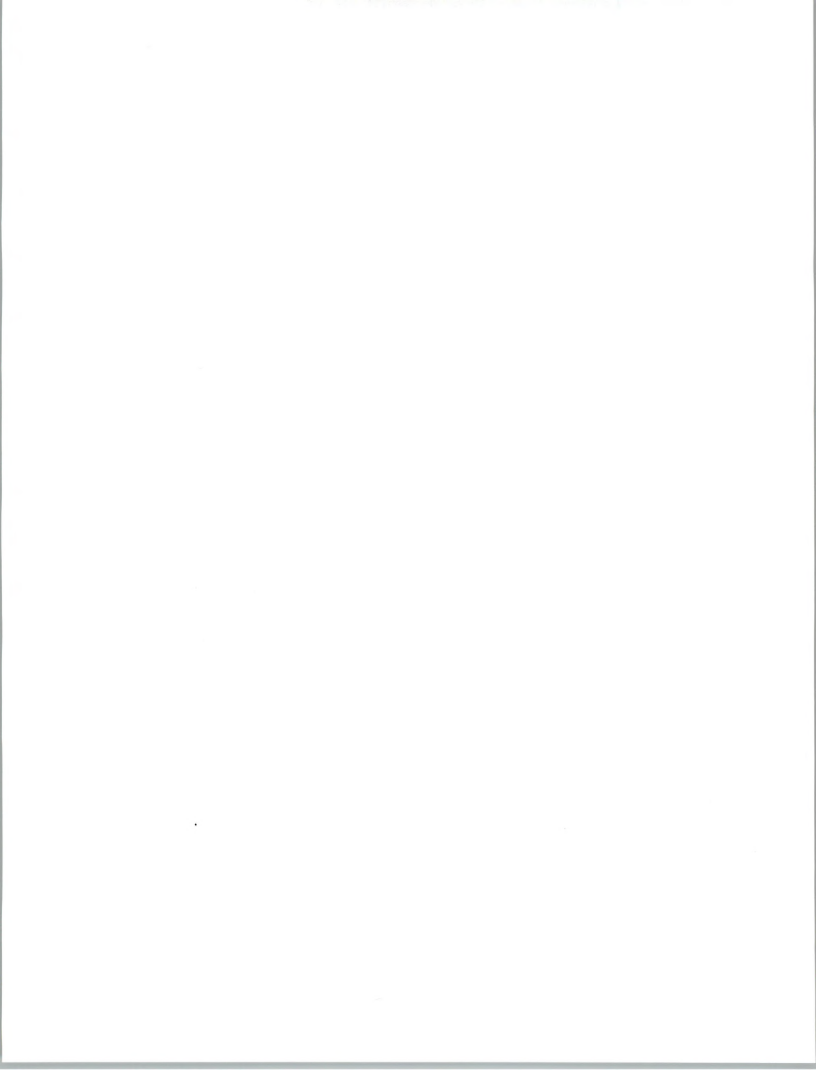
The Potential \$200B "Info-tainment" Market

Market	Size (\$ B)
Home video rentals	11
Magazines	10
Yellow Pages	10
Radio	9
Information services	9

MC3-LH- 9b

INPUT

Notes



The Potential \$200B "Info-tainment" Market

Market	Size (\$ B)
Records/tapes/CDs	8
Theater	5
Video games	4

MC3-LH- 9c

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Notes

Categories of Consumer Software

- Entertainment
- Information
- Transaction
- Education
- Communication

MC3-LH- 10

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Notes

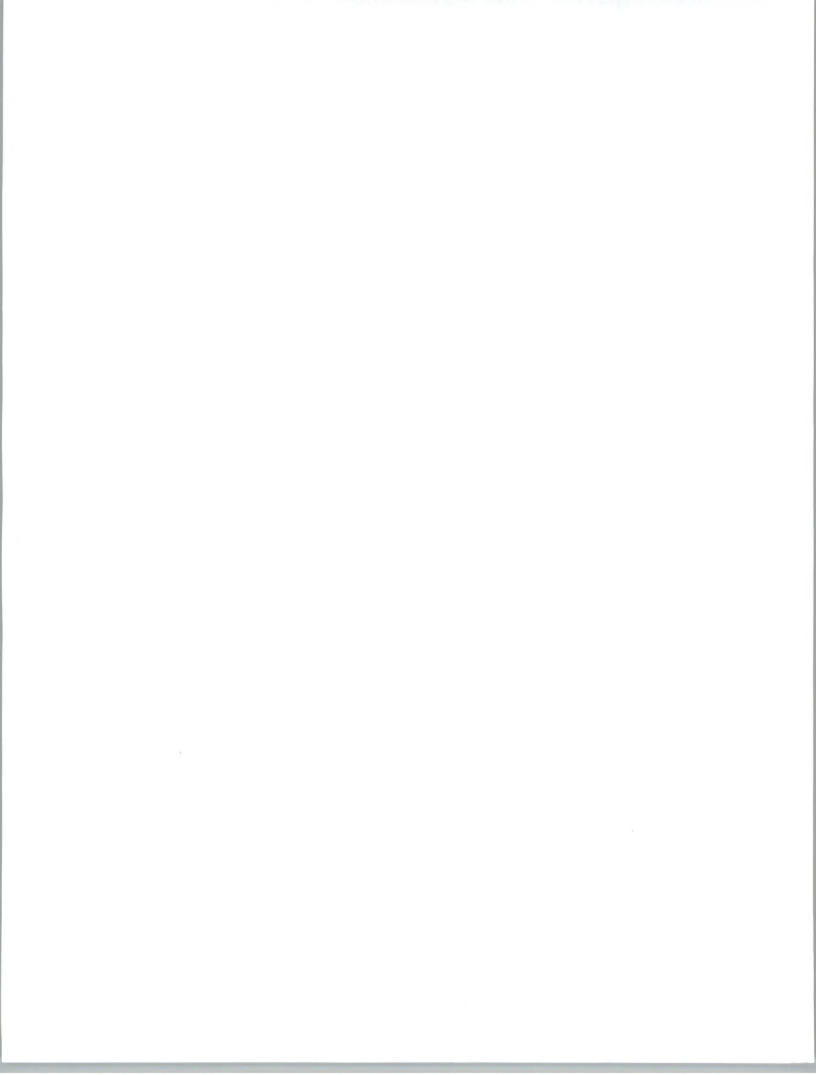
Consumer Computer Software

- Projected 20% growth rate
- Units comprise one-third of shipments
- Changing delivery channels
- Increasing computer literacy
- Games applications rule market

MC3-LH- 11

INPUT

Notes



Enabling Technologies

- Object-oriented database technology
- Authoring tools
- Advances in processing and compression
- Advances in storage
- Knowledge-based access tools

MC3-LH- 12

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Notes

Multimedia on Client/Server Networks

- New competitive order
- Computing shift opportunity
- Delivery to the user-“consumer software”
- Desktop access to all computing resources

MC3-LH- 13

INPUT

Notes

Distributed Computing Framework

Mgmt. Apps.	Tools	Apps.	O.S. Service
Mgmt. Svcs.	Application Services		
	Data	Presentation	
Network Application Support			
Transport Network			
Internetwork			

MC3-LH- 14

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Notes



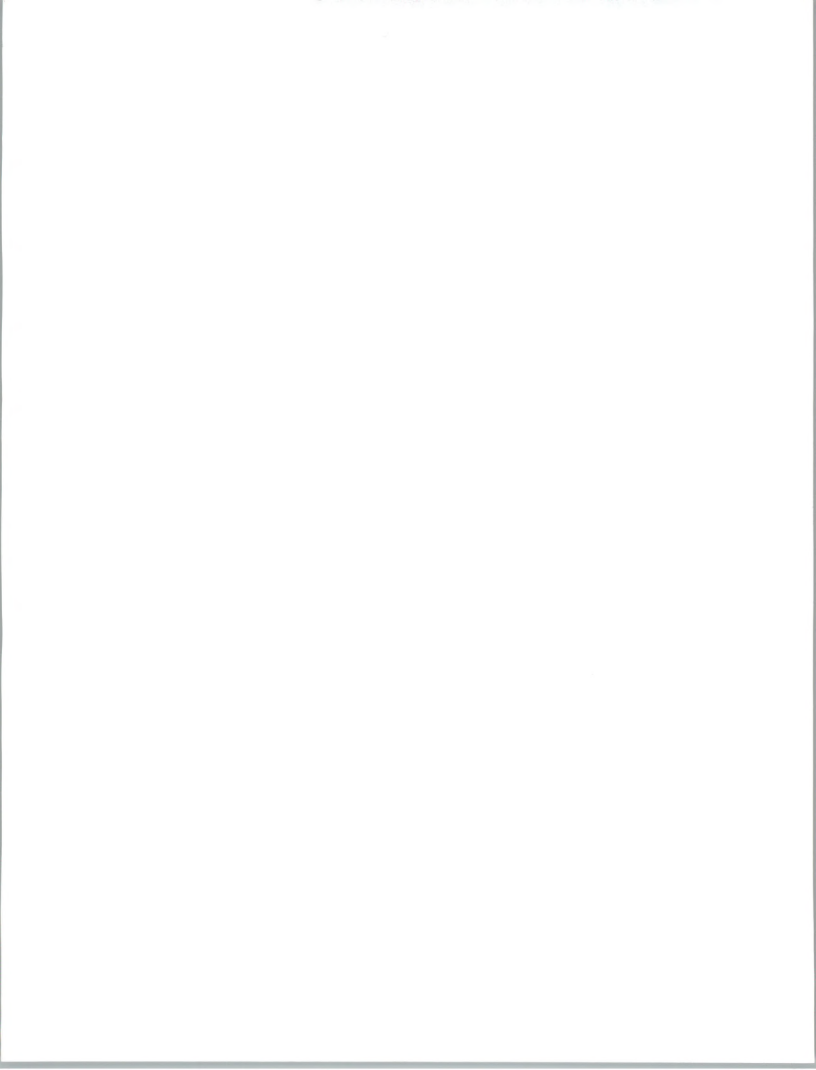
Issues: Network Multimedia Applications

- Digital object-oriented computing (DOC)
- Real time data delivery
- Ensuring bandwidth
- Increased storage
- Software application deployment

MC3-LH- 15

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Notes



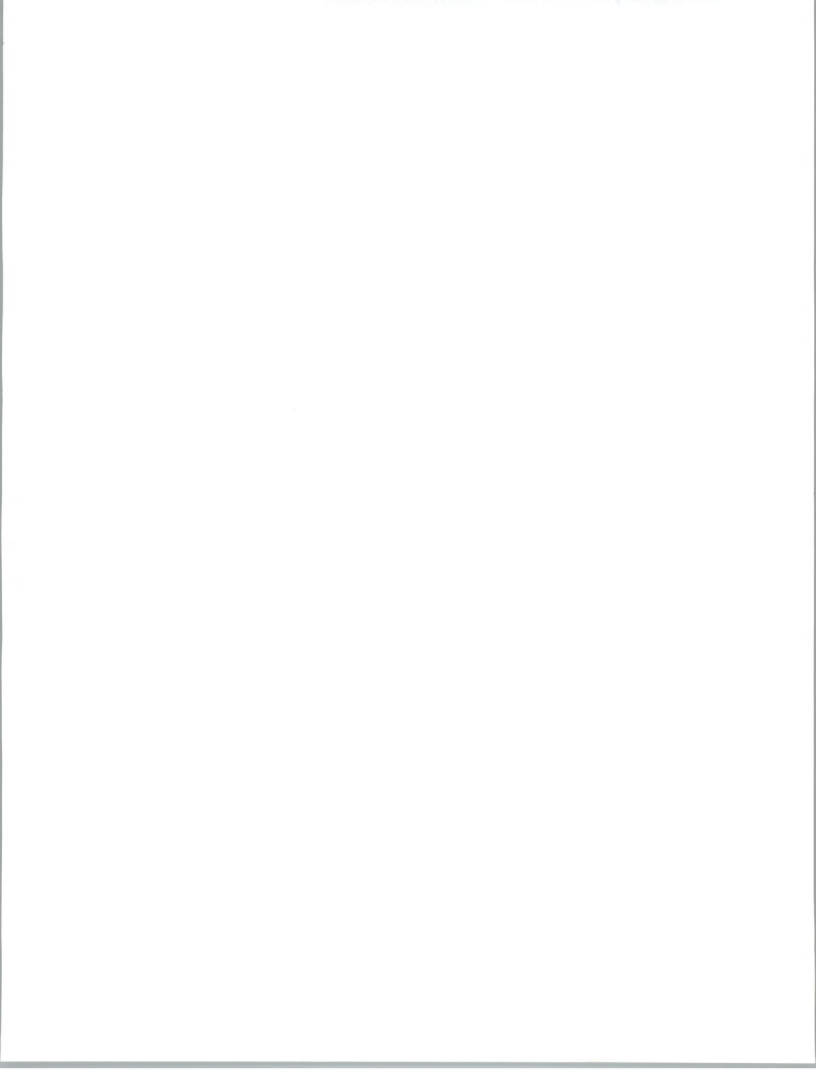
Corporate Enterprise Multimedia Opportunities

- Training and education
- Sales and marketing
- Presentation software
- Video/Voice/Data conferencing
and communications

MC3-LH- 16

INPUT

Notes



Multimedia Market Participants

- Data base
- Applications Tools
- Applications

MC3-LH- 17

INPUT

Notes

DBMS Vendors

- Sybase
- Oracle
- Microsoft
- Raima Corporation

MC3-LH- 18

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Notes

Equipment Vendors

- Silicon Graphics
- IBM
- Amdahl
- Hewlett-Packard

MC3-LH- 19

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Notes

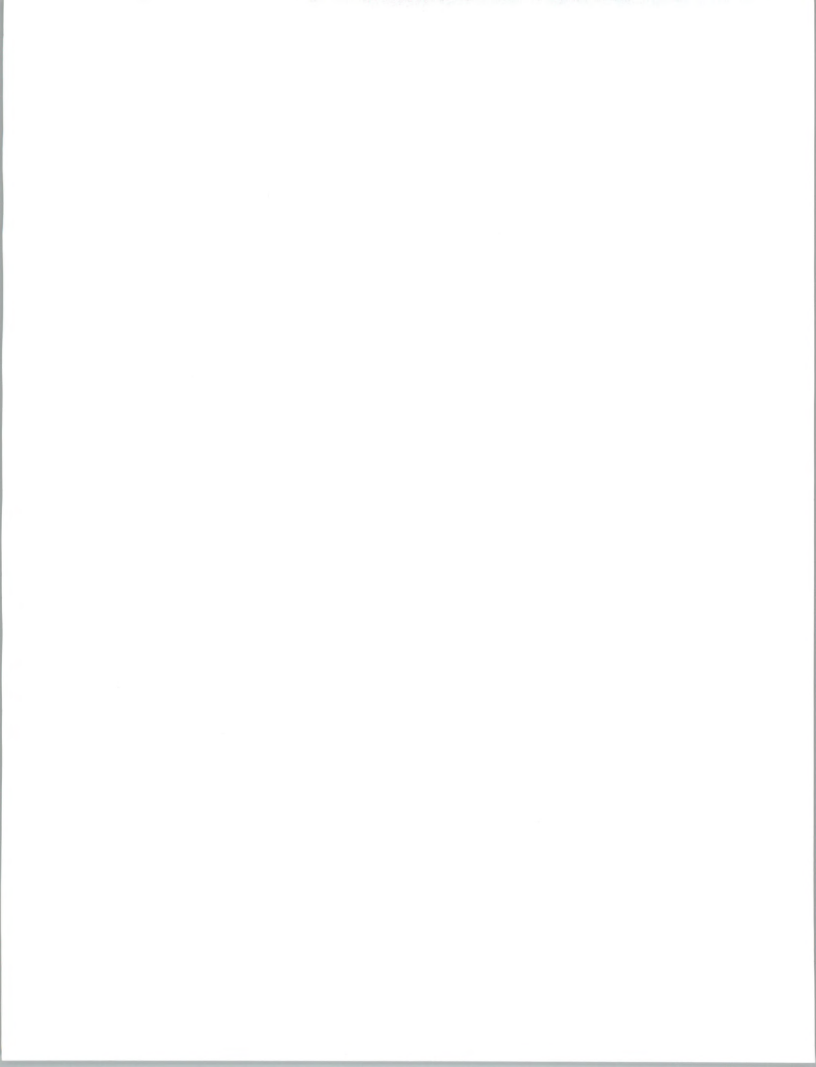
Application Vendors

- Electronic Arts
- BioControl Systems
- Broderbund
- Westcott Communications

MC3-LH- 20

INPUT

Notes



Vendors-Online Interactive Multimedia

- AT&T
- America OnLine
- US West
- Bell Atlantic

MC3-LH- 21

INPUT

Notes

Conclusions

- Robust market growth
- Some technology barriers
- Real corporation applications
- Winning market strategy

MC3-LH- 22

INPUT

Notes



LAURA HAGGERTY
MANAGER, INFORMATION SERVICES
VENDOR ANALYSIS PROGRAM

PROFILE

CAPABILITIES

- For the last five years, Ms. Haggerty has specialized in both the analysis of key issues for companies in high-technology industries and the delivery of business information to companies via electronic media. Projects included the selection of text management software, the design of competitive intelligence systems, the development of key strategic joint ventures in the information industry, and the delivery of an on-line data base offering private company information.
- At INPUT, Laura Haggerty is the Vendor Analysis Program Manager and will develop systems for delivering INPUT reports via electronic media.

BACKGROUND

- From 1990-1992, Ms. Haggerty held the position of Manager, Business Product Development for Information Access Company, a vendor of CD ROM and on-line data bases. Her activities centered on the delivery of competitive information via CD ROM and on-line data bases to the corporate market.
- After receiving her Master's of Library and Information Science in 1987, Ms. Haggerty went on to manage the information resources of the Ernst & Young High Tech Group from 1987 to 1990. Her responsibilities included: data base development, providing primary and secondary research capabilities, management of competitive intelligence and contributing to the support of Ernst & Young's high-technology clients and their information needs.

EDUCATION

- B.A. (Sociology), State University of New York at New Paltz, New Paltz, NY
- M.L.I.S (Master's of Library and Information Science), University of California at Berkeley, Berkeley, CA

